

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b> <i>(use as many sheets as necessary)</i>		<b>Application Number</b>	<b>09/986,354</b>
		<b>Filing Date</b>	<b>11-08-2001</b>
		<b>First Named Inventor</b>	<b>Matthew George Majikes</b>
		<b>Art Unit</b>	<b>3623</b>
		<b>Examiner Name</b>	<b>ROBERT D. RINES</b>
<b>Sheet</b>	<b>1 of 10</b>	<b>Attorney Docket Number</b>	<b>52493.000187</b>

**U.S. PATENT DOCUMENTS**

*Examiner Initials	Cite No.	DOCUMENT NUMBER Number - Kind Code (if known)	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear
		US- 4,831,526	5/16/1989	Luchs et al.	
		US- 4,837,693	6/6/1989	Sholtz	
		US- 4,969,094	11/6/1990	Halley	
		US- 5,191,522	3/2/1993	Bosco	
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		US- 5,293,488	3/8/1994	Riley, et al.	
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		US- 5,668,878	9/16/1997	Brands	
		US- 5,737,728	4/7/1998	Sisley	
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		US- 6,609,106	8/1/2003	Robertson	
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09986354 - GAU: 3623

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**09/986,354**

11-08-2001

### Matthew George Majikes

3623

**ROBERT D. RINES**

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09986354 - GAU: 3623

PTO/SB/08A (08/03) (modified)  
U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

<b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b> <i>(use as many sheets as necessary)</i>				Application Number		09/986,354		
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				Art Unit		3623		
				Examiner Name		ROBERT D. RINES		
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<b>FOREIGN PATENT DOCUMENTS</b>								
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		Country Code Number-Kind Code (if known)					YES	NO
		WO	0191017	11/29/2001	Bates et al.		<input type="checkbox"/>	<input type="checkbox"/>
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**OTHER DOCUMENTS - NON-PATENT LITERATURE DOCUMENTS**

*Examiner Initials	Cite No.	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published	TRANSLATION	
			YES	NO
		PCT-International Search Report dated 10-02-2002 for Application No. PCT/US02/04958, filed 02-21-02	<input type="checkbox"/>	<input type="checkbox"/>
		Patrizio, Legacy Data: One Solution For Two Big Problems, Informationweek.com, June 2000, pages 124, 126, 128	<input type="checkbox"/>	<input type="checkbox"/>
		AKIBIA, CRM: Case Studies, Consulting: Clients, < <a href="http://www.polaris1.com/ecrm/casestudies/citibank/default.asp">http://www.polaris1.com/ecrm/casestudies/citibank/default.asp</a> >, printed 3/26/02, 2 pages	<input type="checkbox"/>	<input type="checkbox"/>
		SIEBELFANS.COM, What is Siebel?, < <a href="http://www.siebelfans.com/More_on_siebel.htm">http://www.siebelfans.com/More_on_siebel.htm</a> >, printed 3/26/02, 3 pages	<input type="checkbox"/>	<input type="checkbox"/>
		Siebel.com, "Implementing Best Practices," <a href="http://www.siebel.com/call-center/workflow-automation.shtml">http://www.siebel.com/call-center/workflow-automation.shtml</a> , printed 2/24/05, 2 pages	<input type="checkbox"/>	<input type="checkbox"/>
		Information available from the web site of Client Marketing Systems, "Advisors Assistant," 9/16/2000, 6 pages	<input type="checkbox"/>	<input type="checkbox"/>
		Staples, Edward, "VA fees discounted via front loading", Advisor Today, 2/2000, Vol. 95, No. 2, pp. 128	<input type="checkbox"/>	<input type="checkbox"/>
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### OTHER DOCUMENTS - NON-PATENT LITERATURE DOCUMENTS

*Examiner Initials	Cite No.	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published	TRANSLATION	
			YES	NO
		Anonymous, "Conseco Expands Web Site, Latest Step in Ongoing Initiative to Become; "Resource center" for Middle-America Customers and Representatives", Business Wire, 7/15/1999, No. 43177075, 3 pages	<input type="checkbox"/>	<input type="checkbox"/>
		Holyoke, Larry, "missouri hot online market for Genelco, other insurers", 3/13/2000, Vol. 20, No. 27, pp 37.	<input type="checkbox"/>	<input type="checkbox"/>
		www.priceline.com 02/29/2000	<input type="checkbox"/>	<input type="checkbox"/>
		"Sam's Teach Yourself Active Server™ Pages in 24 Hours", June 1999, Sams Publishing	<input type="checkbox"/>	<input type="checkbox"/>
		Nguyen, Accessing relational databases from the World Wide Web, 6/1996, ACM SIGMOD, Volume 25, Issue 2, Pages: 529-540	<input type="checkbox"/>	<input type="checkbox"/>
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		Delbaere, IAA 2001 White Paper Insurance Application Architecture (IAA), 03/27/2001, IBM.	<input type="checkbox"/>	<input type="checkbox"/>
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